



## Kimbolton School

Registered Charity Number 1098586

### Your Legacy to Kimbolton School

Your Will is one of the most important documents you will ever sign. It allows for the distribution of your estate (your wealth and possessions) according to your wishes after your death, enabling you to benefit family members, friends, and organisations of your choice. Some estates in the UK may be subject to inheritance tax; it may be possible to reduce the rate of inheritance tax applied to an estate by ensuring that a proportion of the estate is left to UK-registered charities. Kimbolton School is a Registered Charity in the UK, number 1098586.

Legacy gifts (sometimes known as bequests) have benefited Kimbolton School many times over the years. Legacies can be for the general purposes of the school, or for specific purposes (e.g.: a bursary fund). If you plan to leave a legacy to Kimbolton School for anything other than general purposes, it would be helpful if you could please contact the Development Director to discuss how the school can enact your wishes.

The school's motto reads *spes durat avorum* – usually translated as “may the hope of our forefathers endure”. Leaving a legacy to Kimbolton School ensures that the hope of our founders – of education – does indeed endure!

### How to leave a legacy to Kimbolton School

We are grateful to all of those who remember Kimbolton School in their Will. A legacy gift can be written into a new Will, or added to an existing one using a codicil. We recommend that you consult legal advisers before drafting a new Will, updating an existing Will, or making other plans for your estate. A qualified legal advisor will ensure that your wishes are clearly expressed and that all the legal formalities have been correctly adhered to.

There are two main types of legacy gift that you can make under a Will:

- A gift of a specified sum of money (a “pecuniary bequest”). Such a sum of money can be indexed to preserve its value against inflation.
- A gift of a specific portion of your estate, once other considerations have been taken into account (a “residuary bequest”). For example, you could choose to leave 5% of your residuary estate to Kimbolton School.

It is sometimes possible to leave gifts of property, or other assets to the school. It is also sometimes possible to add the school to an existing Will using a codicil form; if you are interested in either of these, please contact the Development Director for a confidential discussion.

The following wording may be used when adding Kimbolton School to a Will:

“I give to Kimbolton School (Registered Charity Number 1098586)

[ the residue of my estate]

[ \_\_\_\_\_ % of the residue of my estate]

[the sum of \_\_\_\_\_]

free of tax for the general purposes of the school and I declare that the receipt by the Bursar or other authorised Officer of the school shall be good and sufficient discharge to my Executors.”

For further information, or if you would like to have a confidential discussion, please contact: Samuel Venn, Development Director (01480-775080, [development@kimboltonschool.com](mailto:development@kimboltonschool.com)).



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### Thanking you for your support

We are grateful to all of those who remember Kimbolton School in their Will, and donors who leave legacies to the School can be thanked in a number of ways:

- When we are notified that you have included the school in your Will, you will receive a letter of thanks from the Headmaster.
- From time to time, we will hold special events to thank our donors and we will be pleased to invite those who have pledged a legacy gift to the school to join with our lifetime donors in these events.
- Our most significant legacies may be recognised with public and lasting expressions of thanks, for example inscribing names on walls, creating named bursaries, etc.

If you have included the School in your estate planning, please complete the form below so that we can thank you.

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### Legacy Intention Form

Please tick as appropriate:

- I have made provision for Kimbolton School in my Will

*Please indicate the type of provision made:*

- Residue of my estate
- Proportion of the residue of my estate (\_\_\_\_\_%)
- Fixed sum of £\_\_\_\_\_ (amount optional). Please note you can choose to index-link this sum to protect the value of the legacy.
- Specific/non-monetary bequest (please give details) \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Please return to:

The Development Office, Kimbolton School, Kimbolton, Huntingdon, Cambridgeshire PE28 0EA.

**Thank you for your support of Kimbolton School**